ATTACHMENT 7

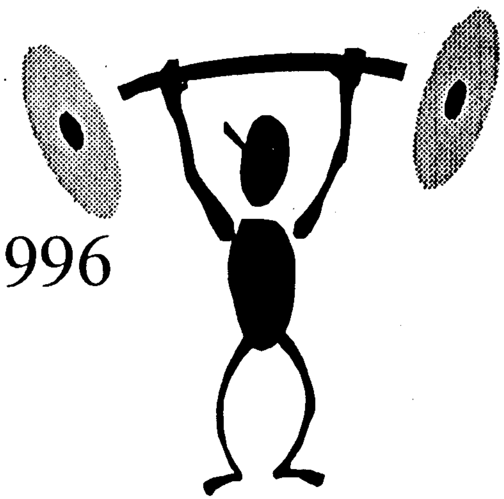
1996 Annual Members Survey

California Organic Recycling Council

CORC 1996-1997

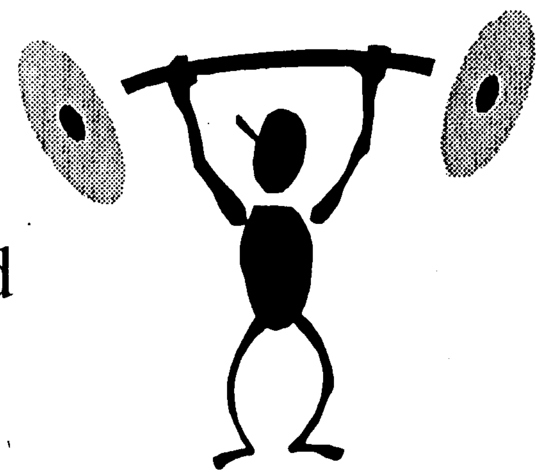
CORC 1996 Annual Members Survey

- **Industry Vital Statistics - Averages**
  - Avg. 7 years in business
  - Most have 1 location, 30% with 2 or more
  - 80% of the operators are in private sector
  - Avg. 13 employees per location
  - Most will be hiring in 1997 - Avg. 2
  - $800 K Avg. annual gross sales for 1996



CORC 1996 Annual Members Survey

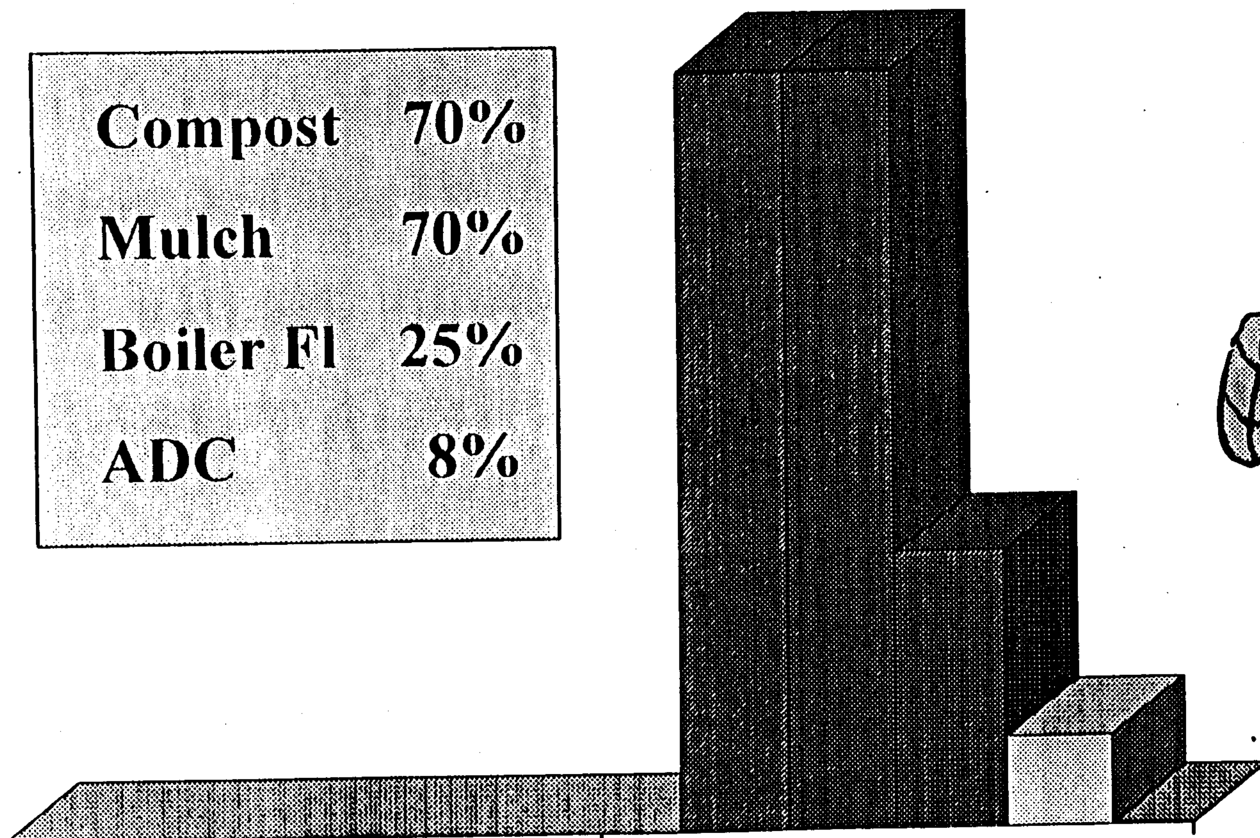
- **Industry Vital Statistics - Averages**
  - $1 Mil est. annual gross sales for 1997
  - 35K Tons Avg. recycled annually per site
  - 140 TPD Avg. current flow for most sites
  - 300 TPD Avg. site capacity
  - 10+ Acres Avg. size per site
  - Clean green & source separated
  - 260 Known sites

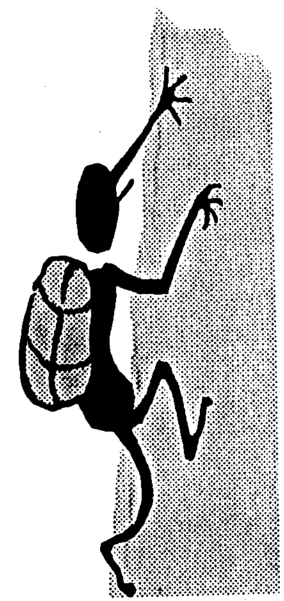


CORC 1996 Annual Members Survey

• Products Produced - By Operator

Compost	70%
Mulch	70%
Boiler Fl	25%
ADC	8%





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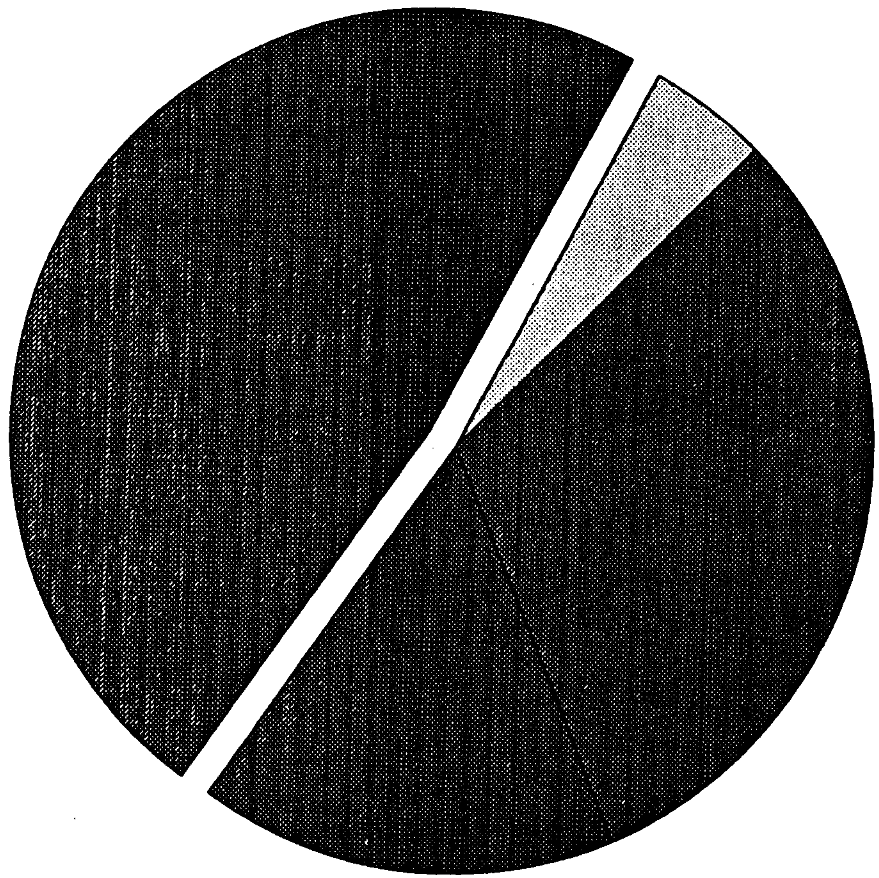
- **Est. Total Tons Diverted - 13.6 Mil.**

Compost - 4.2 Mil. / 30%

Mulch - 2.3 Mil. / 18%

Boiler Fl. - 6.5 Mil / 47%

ADC - 640K / 5%



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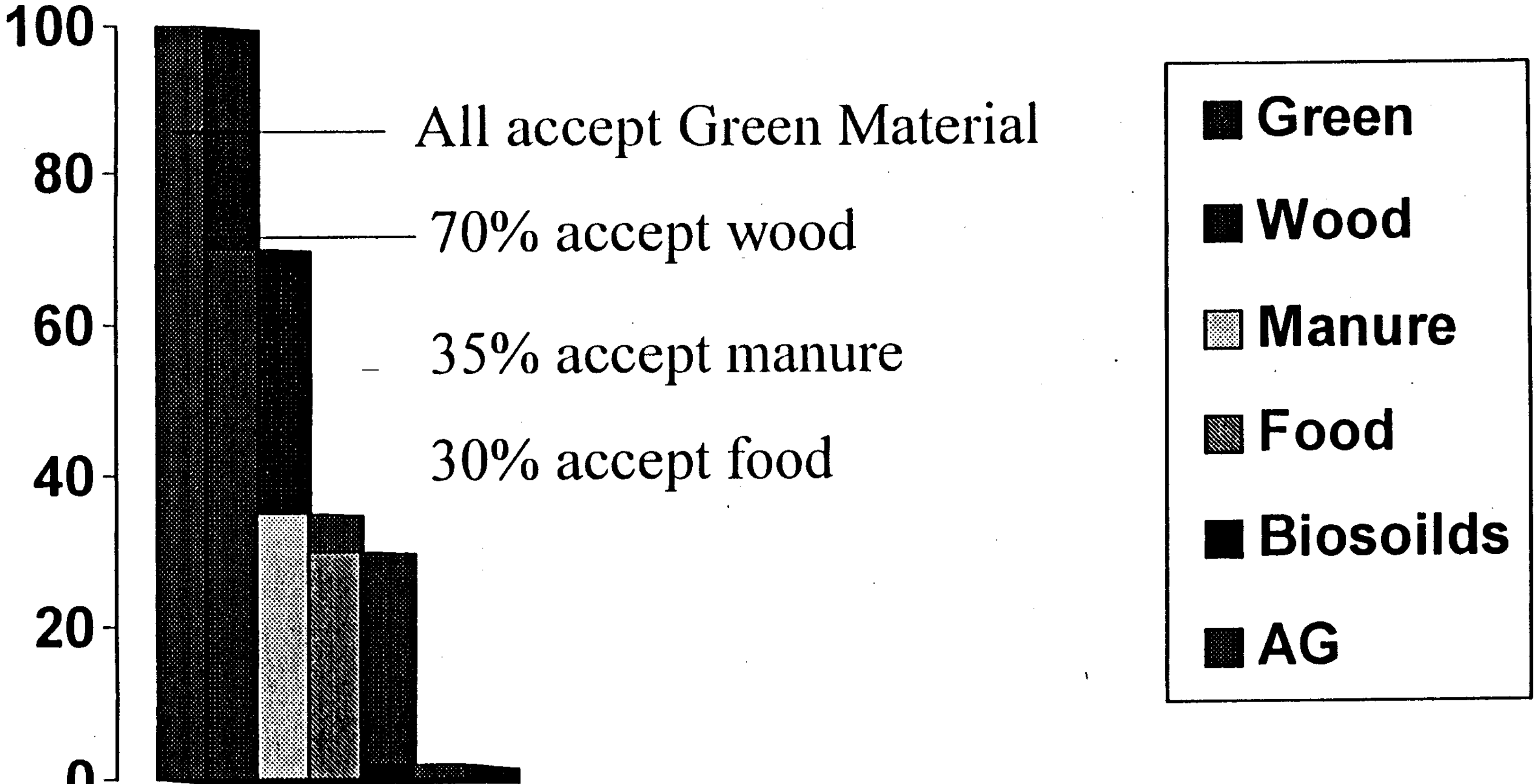
Types of Feedstock Accepted



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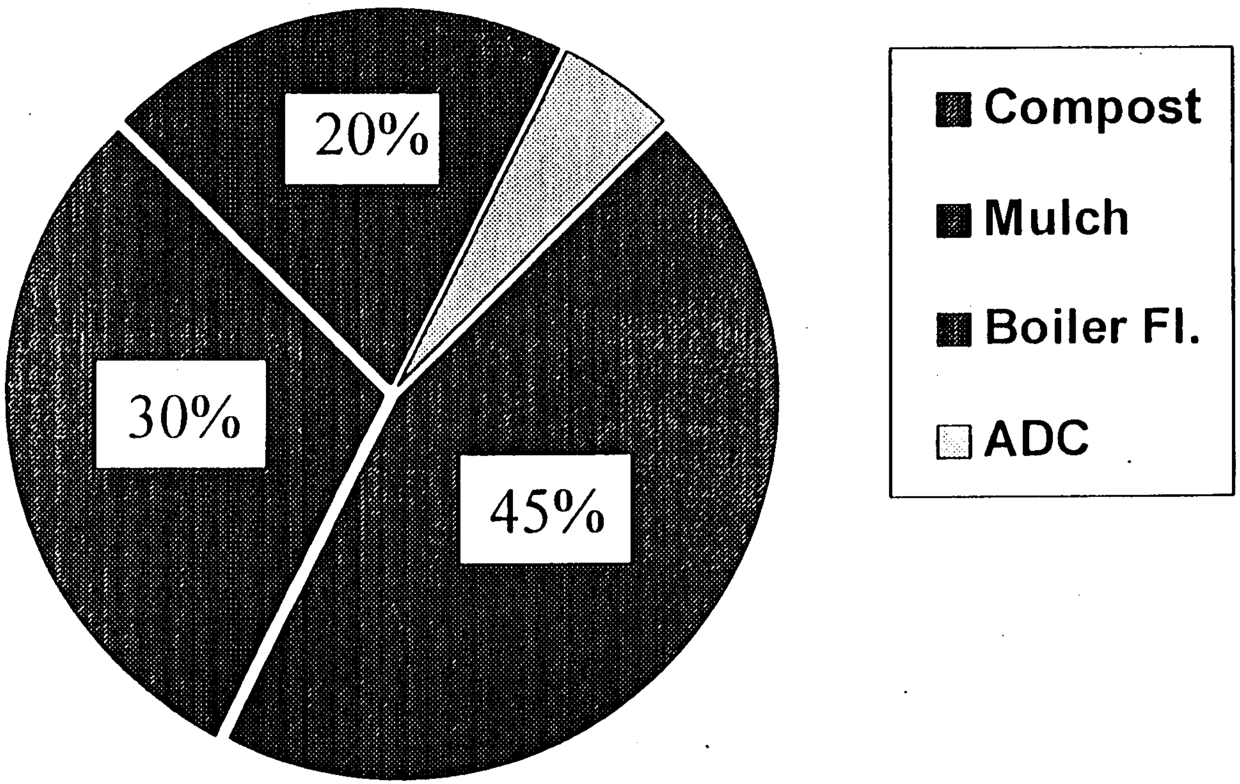
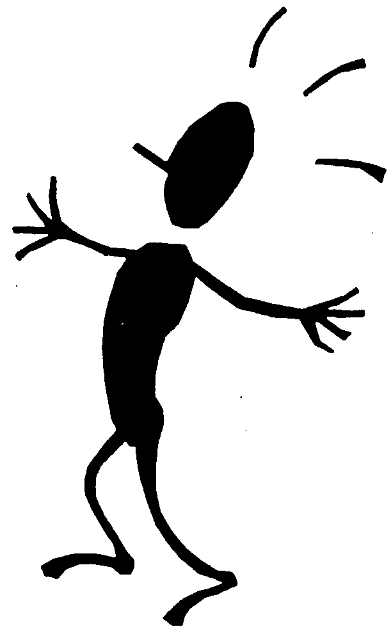
% Total Feedstock - by Product





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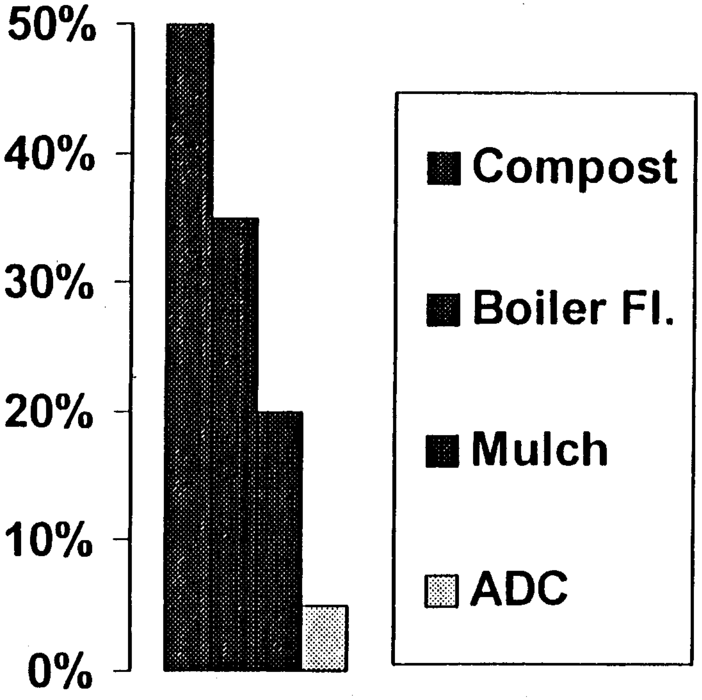
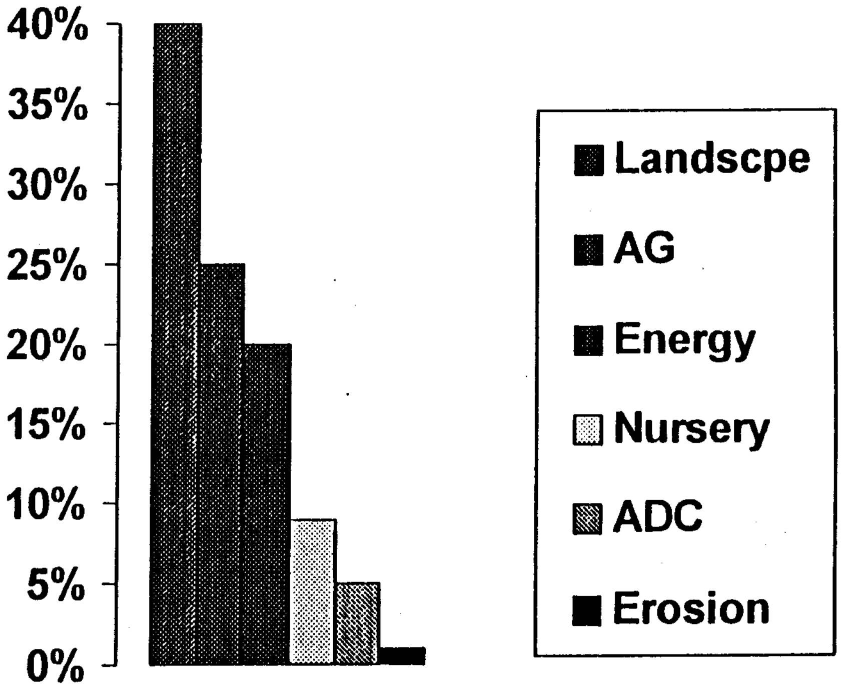
- % $ Sale - Product



% $ Sale - Market



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- **Compost Regulations:**
  - Majority rated regulations OK to Great
  - Effect on Cost was neutral to increased
- **Biomass Plant Curtailment**
  - Maj. of operators have been adversley effected
  - Contracts cancelled
  - Most have developed alternative markets
  - Prices have dropped an average of 30%

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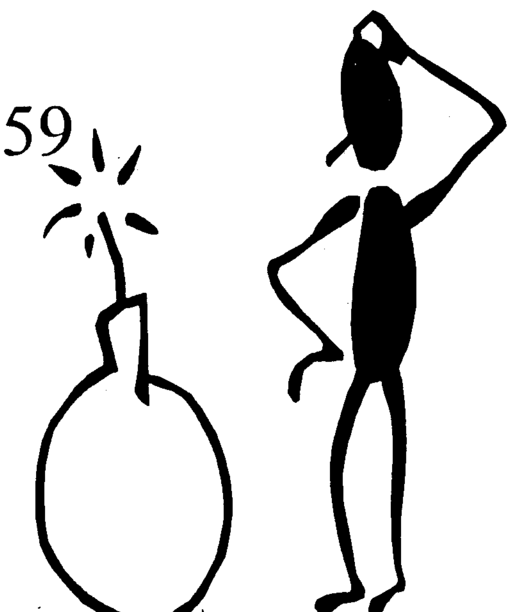
- **Biomass Plant Curtailment - cont.**
  - Maj. have increased tipping fees
  - Average increase for tipping is 20%
- **AB 59**
  - 50% of operators familiar with AB59
  - 30% have been contacted by LEA
  - 40% of operators have permit or in process



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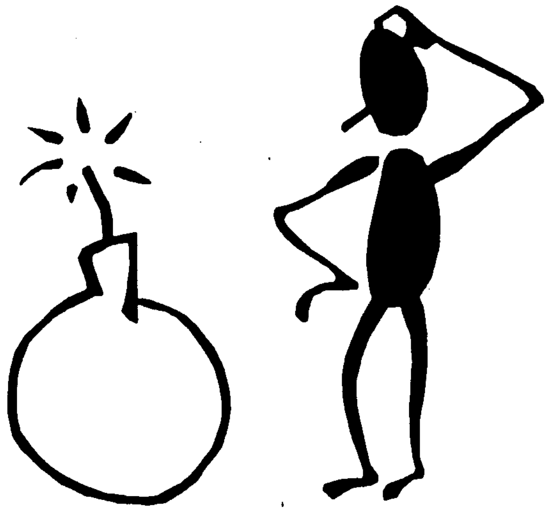
- **Alternative Daily Cover (ADC)**
  - Less than 10% produce ADC
  - Majority of operators reported local landfill utilizes Green materials as ADC
  - 40% of operators support ADC as recycling



CORC 1996 Annual Members Survey

- **Conclusions & Summary**
  - – Industry shift from Boiler Fuel to Compost
  - – Growth rate for new operators is down.
    - Factors - Biomass curtailment, Flow Control & ADC programs.
  - – Established operators are stronger with broader customer base & multiple product lines.
  - – Food material increasing as % of feedstock.

CORC 1996 Annual Members Survey

- **Conclusions & Summary**
  - Avg. Facility is at 50% capacity
  - 1 Biosolid facility responded to survey
  - Overall operators are stronger and more diversified verses 2 years ago
  - Expect modest growth of industry in 1997.
  - Expect continued expansion of compost market in AG.